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SUBJECT: SHARON'S POST-DISENGAGEMENT DILEMMA: POLLS SHOW  
SHARON LOSING BUT WINNING

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SUMMARY  
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1. A welter of political polling prompted by the eve-of-disengagement resignation of cabinet minister Binyamin Netanyahu indicates that while Prime Minister Sharon is capable of "taking the country" in national elections, some factions within his Likud party would like to deny him the chance. The polls conducted in the immediate aftermath of settler evacuation from the Gaza Strip, have been uniform in predicting Netanyahu as the victor of Likud leadership primaries. Faced with this scenario, Sharon can continue fighting the Netanyahu faction in an effort to stave off early primaries, while hoping tangible benefits of disengagement will turn the Likud membership in his favour. Ultimately, however, with primaries already set for April 2006, Sharon must face a Likud leadership vote, at which juncture his best option -- according to the latest polls -- may be to bypass the Likud primaries altogether by forming his own party.

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DISENGAGEMENT DERAILS THE ELECTIONS TIMELINE  
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2. Israel's next parliamentary elections are scheduled for November 2006, but the immediate impact of disengagement has been to prompt serious expectations of a much earlier election date. In anticipation, and despite the party chairman's efforts to delay any action to advance that date of party primaries, the Likud Central Committee will meet September 25-26 to vote on a proposal to bring forward to November the scheduled April 2006 party leadership primaries in which an estimated 150,000 registered Likud members may vote. One week into the disengagement process, Channel Ten of Israel Television still had good news for Sharon when it canvassed 502 Likud members who gave him 36% support, compared to 28% for Netanyahu. Two days later, on 24 August, Ha'aretz newspaper published a poll among Likud members in which a three-way primary between Sharon, Netanyahu and Uzi Landau returned a reduced 30.6% for Sharon, 26.3% for Netanyahu and 24.2 percent for Landau, with 8.7% rejecting all three candidates. In such a scenario, in which no single candidate gains 40% or more of the vote, a second-round run-off would be held between the two front-runners. The Ha'aretz poll of Likud members on just such a two-way contest gave an impressive 46.9% of their support to Netanyahu against 30.5% for Sharon.

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NETANYAHU WINS THE BATTLE BUT MAY LOSE THE CAMPAIGN  
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3. Netanyahu's supremacy within Likud swiftly assumed axiomatic status, with the mass-circulation newspaper Ma'ariv citing the earlier Ha'aretz poll and its near-17-point lead for Netanyahu over Sharon as the premise for a poll of 528 adult members of the population who were asked to consider various election scenarios. Polled as to the likely results if Sharon is removed from the arena by a Likud primaries defeat, leaving Netanyahu to head Likud in parliamentary elections, the sample came up with a near tie between a Netanyahu-led Likud winning 32 Knesset seats (down from Likud's current 40 seats) against Labor's 31 (up from Labor's current 21 seats). The anticipated Knesset alignment of coalition and opposition parties from such a result proves to be of precisely equal strength: 60 seats each and no majority for either. At the other end of the scenario spectrum, Ma'ariv polled the likely outcome of what is considered the most unlikely option: "the big bang" or formation of a mega-party comprising a Sharon-led Likud, Labour and Shinui. According to the poll, that alignment would yield 54 seats for Sharon's bloc against 23 for Netanyahu's Likud, but would damage Sharon's credibility with the Likud core and could spell the end of Likud as the powerful super-party in which Sharon says he still believes.

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SHARON VERSUS THE LIKUD  
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4. Ma'ariv's other most likely scenario, "the small bang" or fragmentation of Likud into a Sharon-led breakaway party pitted against Netanyahu involves real risks for Sharon, but

greater returns if he can survive the split from the party he himself created. Polling a sample of the general public on this scenario, Ma'ariv found 34 seats for a Sharon-led breakaway Likud compared with 20 for a Netanyahu-led Likud hardline faction. The polling showed Labor dropping to 17 Knesset seats from its current 21, with the centrist Shinui reduced to 9 from 15. That outcome would benefit Sharon by downsizing Labor and Shinui to the stature of possible junior coalition partners with everything to gain from participation in government and very little to lose.

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LIKUD CAN CHOOSE: A LEADER OR THE NEXT PRIME MINISTER  
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15. Netanyahu's clear ascendancy within the ranks of Likud members and the inner circle of the powerful central committee is not matched by his broader electoral magnetism. The Ma'ariv poll of August 25 shows that in parliamentary elections Sharon simply delivers more votes than Netanyahu can hope for: A Sharon-led Likud pulls in 38 Knesset seats compared to 32 for a Netanyahu-led Likud. The August 26 Yediot poll that has Netanyahu beating Sharon 42% to 35% in Likud primaries also notes that 23% of those polled were undecided -- a factor that renders the poll of limited encouragement to the Netanyahu camp.

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COMMENT  
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16. In short, Likud members will need to decide whether they would rather be "right" or in power. Likud as a party that seeks to lead the next government must decide whether Sharon's proven ability to garner support across the political spectrum makes him a greater electoral asset to Likud than the charismatic, volatile Netanyahu. Sharon will have to exercise all his combative talents to subdue the central committee, but he is a sitting prime minister in a government that is winning international praise, and he will not be wholly alone in the task. Likud pragmatists will be looking for compromise formulae to retain Sharon while reining him in on future policy decisions. The hard-line rebels and all those who have little or nothing to seek in the way of gratitude from Sharon will work to unseat him by means of early primaries. The clear schism in the polls to date -- which reveals Netanyahu as a potential primaries winner but an overall leadership liability -- is not lost on either his supporters or detractors.